

# A Quick Start Guide to Survey Research

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# Welcome to survey research



This book is intended to be a quick resource for conducting survey research. By no means is it intended to be comprehensive of all survey research methodologies.



# Preface

Hopefully you'll find this book to be a condensed and easy to read resource on survey research. We developed this book in the hopes of future collaboration among other UX researchers.

## Outline

The content of the book will include:

- **Chapter 1**
- **Chapter 2**

## Prerequisites

All you need is an interest in conducting survey research and basic data analysis, we'll include code snippets (python and R) along the way.

## Acknowledgements

This book wouldn't be possible without the contributions of:





# Chapter 1

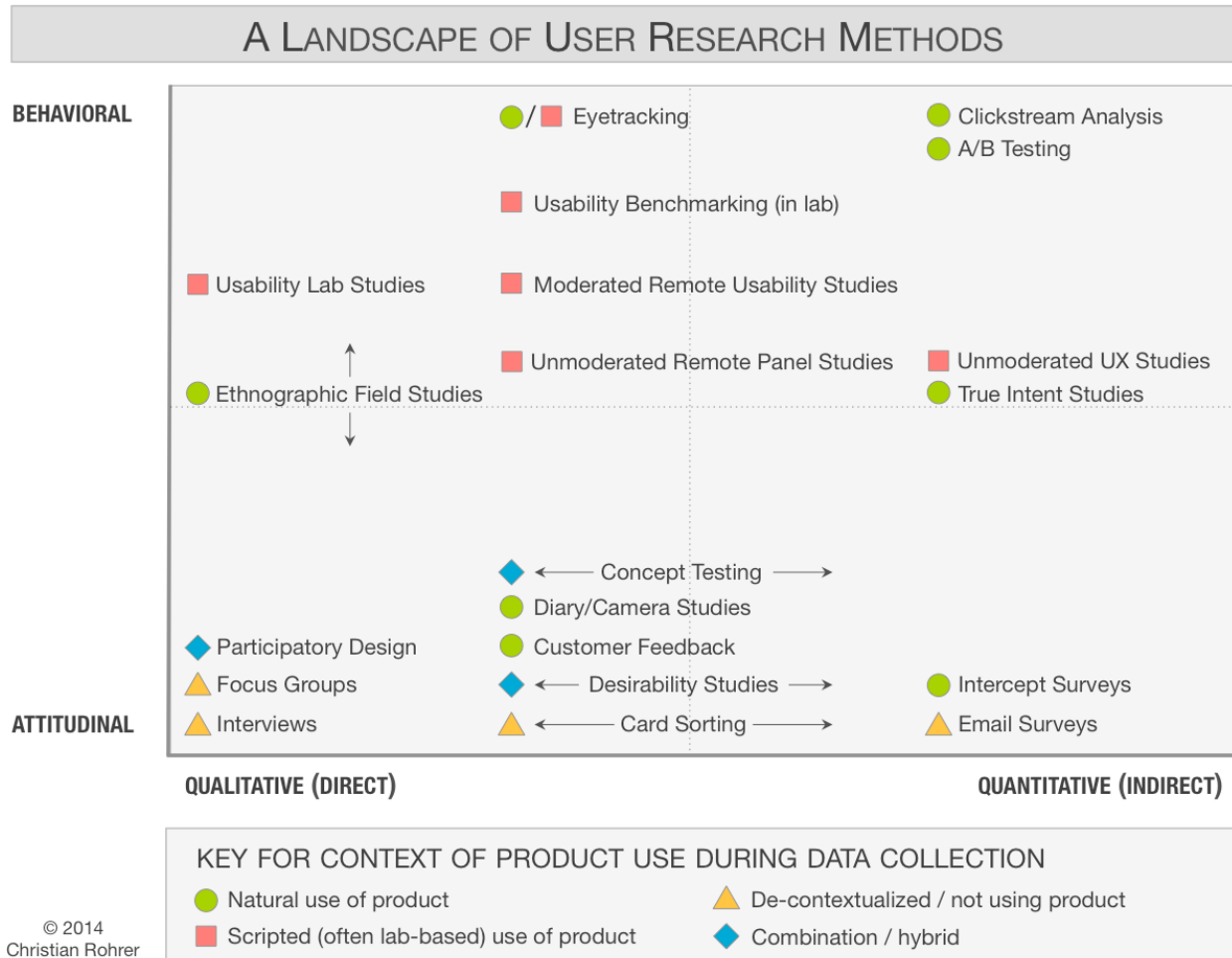
## Designing a survey

### 1.1 What is your research goal?

First, establish if a survey is the right method to accomplish your research goal by asking yourself:

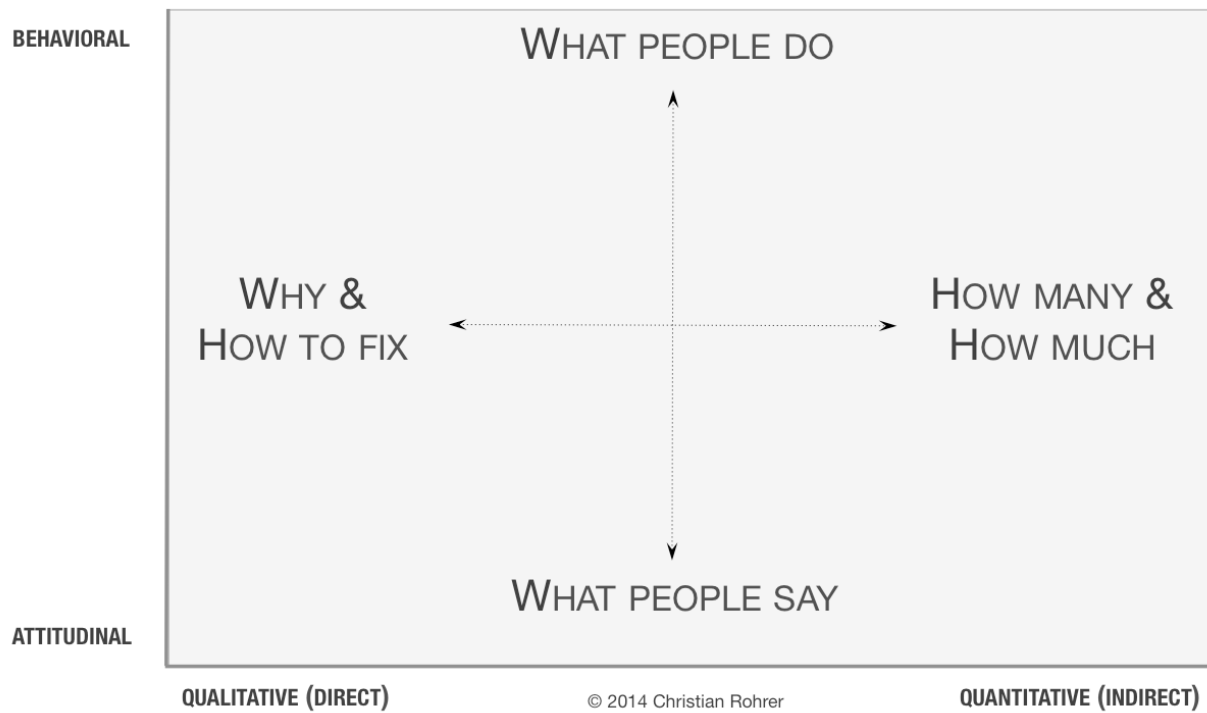
- What do you currently know?
- What *don't* you know?

Below is a useful visualization from the Nielsen Norman group on how to decide between which qualitative or quantitative methods to answer your research goal ([Rohrer, 2014](#)).



Surveys are great for answering the “How many and how much” of what people do and say; surveys are not the best method at understanding the “Why and how to fix” a product problem.

## QUESTIONS ANSWERED BY RESEARCH METHODS ACROSS THE LANDSCAPE



## 1.2 Who are you studying?

This question may be simple at first, but when you start to narrow down



## Chapter 2

# Writing effective survey questions

Effective survey questions result in **consistent** and **reliable** responses.



## Chapter 3

# Survey Analysis

After you've fielded your survey, here are the steps to making sense of the data.

This section assumes you have a laptop set up to work with in either R or python. Head over to the Appendix page if you need help with set up.

### 3.1 Organize your workspace

Before beginning any analysis, you'll want to set up a reproducible workflow. Below is an adapted suggestion on how to organize your workspace from Ben Marwick, Carl Boettiger, and Lincoln Mullen ([Ben Marwick, 2018](#)). Keeping your workspace organized is the best way for you and others to understand and reproduce your analysis.

```
project
|- DESCRIPTION          # project metadata and dependencies
|- README.md           # top-level description of content and guide to users
|
|- data/               # data files used
|   +- raw_data.csv    # data files in open formats such as TXT, CSV, TSV, etc.
|   +- cleaned_data.csv # data files that have been cleaned, merged, etc that you'll use for survey ana
|
|- analysis/           # any programmatic code
|   +- my_report.Rmd    # R markdown file with narrative text interwoven with code chunks
|   +- makefile         # builds a PDF/HTML/DOCX file from the Rmd, code, and data files
|   +- scripts/         # code files (R, shell, etc.) used for data cleaning, analysis and visualisation
|   +- figures/         # saved outputs of your figures
|
|- R/
|   +- my_functions.R   # custom R functions that are used more than once throughout the project
|
|- man/
|   +- my_functions.Rd  # documentation for the R functions (auto-generated when using devtools)
|
```

#### R version

```
#List the directory names you want to create
folder_names <- c("data",
                  "data/raw",
```

```

        "data/clean",
        "analysis",
        "analysis/scripts",
        "analysis/figures",
        "R")

#Create the directories
sapply(folder_names, dir.create)

```

## 3.2 Data Cleaning

Before you can begin looking at the results, you'll need to clean the data. By “cleaning” the data, we mean edited the raw file into a format that will make the analysis valid and easier.

### 3.2.1 Load the data

Download your raw survey data as a csv and load it into your analysis tool of choice (e.g. Ipython notebook or Rstudio)

#### R version

```

#load necessary packages for analysis
library(tidyverse)      #contains all the library packages to manipulate and transform data
library(summarytools)   #shortcut tools to visualize summaries of the data

#read/store the data as the variable df (short for dataframe)
#replace "file" with "https://raw.githubusercontent.com/lizmcarey/survey-guide/master/sample_data/SurveyData.csv"
df <- read_csv(file)

```

#### python version

```

#load necessary modules for analysis
import pandas as pd

#read/store the data as the variable df (short for dataframe)
df = pd.read_csv(filename)

```

### 3.2.2 Loading Qualtrics data

When you download a csv from Qualtrics, it will come with a few extra rows you don't need. Here are some automated scripts you can add to your makefile to speed up your work =flow

#### R version manual

```

#Store the column names by reading in the column header
df_names <- read_csv(file, n_max=0) %>% names()

#Read the entire file,
df <- read_csv(file,
               col_names = df_names, #use df_names to title the columns
               skip = 3) #skip the first three lines

```



```
#store the question names
question_bank <- read_csv(file, n_max=1) %>% #read in the first row of file
  select(starts_with("Q")) %>% #select columns that start with Q
  gather(key, question_text) #move data from wide to long
```

#### R version programmatic

```
load_qualtrics_csv <- function(file) {
  df_names <- read_csv(file, n_max = 0) %>% names()

  df <- read_csv(file, col_names = df_names, skip = 3)
}

get_questions <- function(file) {
  qb <- read_csv(file, n_max = 1) %>%
    select(starts_with("Q")) %>%
    gather(key, question_text)
}

#Use function to read in survey file, and skip first 3 lines
df <- load_qualtrics_csv(file)

#Use function to store question wording
question_bank <- get_questions(file)
```

### 3.2.3 Preview the data

It's important to get a look at the data to spot an errors in uploading, etc.



# Appendix A

## Setting up R

### A.1 Package installation

You'll want to install the following packages:

```
library(tidyverse)
```



## Appendix B

# Setting up python

```
# Pandas makes working with data tables easier
import pandas as pd

# Numpy is a library for working with Arrays
import numpy as np

# Module for plotting graphs
import matplotlib.pyplot as plt
import seaborn as sns

# SciPy implements many different numerical algorithms
import scipy.stats as stats
import collections
```



# Bibliography

- Ben Marwick, Carl Boettiger, L. M. (2018). Packaging data analytical work reproducibly using r (and friends). *PeerJ*.
- Rohrer, C. (2014). When to use which user-experience research methods. *Nielsen Norman Group*.